



UNPACKING IMPACT

A one-day forum for exploring impact
measurement for social enterprises

JUNE 21, 2016 . TORONTO, CANADA

Mowat Centre
ONTARIO'S VOICE ON PUBLIC POLICY



Ontario

Schedule

7:30

Registration

Continental breakfast available

8:30

Welcome

Opening host & partner remarks

Lisa Lalande, *Mowat NFP*

Rajesh Sankrat, *Mowat Centre*

8:35

Special Guest

9:00

Open Plenary

Measuring What Matters – Identifying emerging global trends in impact measurement

Hear how other countries are approaching their challenges in impact measurement for social enterprises and learn about new and emerging practices.

Facilitator: Karim Harji, *Purpose Capital*

Marcus Hulme, *Big Society Capital*

Sara Olsen, *Social Venture Technology Group*

Katherine Kennedy, *Social Traders*

10:30

Break

10:45

Concurrent Session 1 - ROOM 205B

Unpacking What Works: Building common frameworks for public good

Speakers to focus on their specific organizational strategies and approaches to impact measurement, including an exploration around the use of incentives, challenges & emerging practices.

Facilitator: Tessa Hebba, *Carlton Centre for Community Innovation*

Marcus Hulme, *Big Society Capital*

Dan Osusky, *B Lab*

Jaan Aps, *Estonian Social Enterprise Network*

Concurrent Session 2 - ROOM 205C

Unpacking What Works: Bringing metrics to life – investor and social enterprise perspectives

Exploring impact measurement from the lens of funders and social enterprises. What are the challenges and solutions regarding practical implementation?

Facilitator: Andrea March, *RBC*

Laurie Mook, *Arizona State University*

Patrick Hergt, *Sarona Asset Management*

Alex Oppes, *Social Ventures Australia*

Concurrent Session 3 - ROOM 205A

Unpacking What Works: Embedding impact measurement practices in social enterprises

A discussion on leading practices on the adoption, quality and sustainability of impact measurement practices across social enterprises. Panelists will touch upon organizational capacity needs and challenges, skills training, measurement processes, and creating an 'organizational culture' of impact measurement. As well, mechanisms to interpret, report, and communicate impact to different stakeholders.

Facilitator: Bruce Dewar, *LIFT Philanthropy Partners*

Sara Olsen, *Social Venture Technology Group*

Anton Simanowitz, *Social Performance Solutions*

Katherine Kennedy, *Social Traders*

12:00

Lunch

1:15

Concurrent Session 1 - ROOM 205B

Unpacking What Works: Building common frameworks for public good
(Repeated session)

Concurrent Session 2 - ROOM 205C

Unpacking What Works: Bringing metrics to life
(Repeated session)

Concurrent Session 3 - ROOM 205A

Unpacking What Works: Embedding impact measurement practices
(Repeated session)

2:45

Break

3:00

Closing Plenary

Where to next? The journey ahead for Ontario's social enterprises

Meeting our challenges to achieve Ontario's social enterprise goals: What could a future vision of impact measurement for social enterprises look like? What are the strategies to achieve it?

Facilitator: Katie Gibson, *MEDG*

All international speakers

4:00

Closing Remarks

Lisa Lalande, *Mowat NFP*

Katie Gibson, *MEDG*

Facilitators



BRUCE DEWAR

CEO, LIFT Philanthropy Partners

Bruce has more than 25 years of experience consulting with private companies and public agencies, including international projects spanning 12 countries. As president and CEO of LIFT, Bruce leads the organization into the field of venture philanthropy. Bruce holds a master of science in management of technology from Massachusetts Institute of Technology.



KATIE GIBSON

Director, Social Enterprise Branch, Ontario Ministry of Economic Development and Growth (MEDG)

Katie is a lawyer and MBA graduate with extensive Canadian and international experience in social innovation, consulting, and advocacy. Before joining government, she served as Manager of Community Finance Solutions at the MaRS Centre for Impact Investing.



KARIM HARJI

Co-Founder and Director, Purpose Capital

Karim Harji is a Director at Purpose Capital, where he works with impact investors and social finance intermediaries to design, implement, and evaluate impact investment strategies. He previously evaluated the Rockefeller Foundation's \$40m Impact Investing Initiative, and was a member of the Impact Measurement Working Group of the G8 Social Impact Investment Taskforce.



TESSA HEBB

Director, Carlton Centre for Community Innovation

Dr. Hebb is a Distinguished Research Fellow with the Carleton Centre for Community Innovation, Carleton University, Canada. She received her Doctorate from Oxford University and is a member of the steering committees of the UN-backed PRI Academic Network, the Heartland Network, Canadian Business Ethics Research Network, the Canadian Social Investment Organization and the Impact Investing Policy Collaborative.



LISA LALANDE

Executive Lead, Mowat NFP Hub

Lisa leads the NFP research hub within the Mowat Centre. She has almost 20 years' experience in both the non-profit and financial services sectors. Most recently, she was on the executive team at Lift Philanthropy Partners, a venture philanthropy organization focused on helping social purpose organizations increase their accountability, establish performance metrics, and improve their overall capacity to deliver social impact.



ANDREA MARCH

Manager, Research & Partnerships, Social Innovation, RBC

Andrea manages partnerships, sponsorships and research projects with the goal of increasing awareness around how private capital and financial markets can deliver social impact. Andrea holds a Masters in Environment and Sustainability (MES) from Western University and a Bachelor of Arts, Honours from Queen's University.



RAJESH SANKAT

Policy Intern, Mowat Centre

Rajesh joined the Mowat Centre as a Policy Intern in April 2016. He is currently a graduate student at the School of Public Policy and Governance at the University of Toronto, and Executive Producer of Beyond the Headlines, a current affairs talk radio show on CIUT 89.5FM.

Speakers



JAAN APS

Co-Founder and Chairman,
Estonian Social Enterprise
Network

Jaan leads one of the strongest social enterprise support networks in Northern Europe. He is a member of GECES, the European Commission's Expert Group on Social Entrepreneurship. In 2016, Jaan will launch a state-supported impact mapping web portal for Estonian grass-root level changemakers.



PATRICK HERGT

Senior Investment Analyst,
Sarona Asset Management

Patrick is a member of Sarona's investment team since 2012. He joins a private equity firm deploying growth capital in PE funds and companies in Frontier and Emerging Markets and seeking to operate to the highest business, ethical, social and environmental standards to achieve impactful outcomes.



MARCUS HULME

Social Impact Director, Big
Society Capital

Marcus leads on social impact measurement at Big Society Capital which is the world's first wholesale social investment bank that provides capital to charities and social enterprises. His work involves assessing, measuring and sharing impact evidence to help improve practice and grow the social investment market in the UK.



KATHERINE KENNEDY

Strategy Manager, Social
Traders

Katherine leads strategic planning, business development strategy and impact measurement for Social Traders. Social Traders is the only specialist social enterprise development intermediary in Australia. Katherine's work includes developing evidence-based policies and proposals for Government, philanthropy and corporates to grow investment and support for social enterprise.



LAURIE MOOK

Assistant Professor, Nonprofit
Leadership and Management,
School of Community
Resources and Development
Arizona State University

Laurie Mook is a faculty member in the College of Public Service & Community Solutions at Arizona State University. She has published extensively on social accounting for social economy organizations, including her edited book, *Accounting for Social Value* (UT Press).



SARA OLSEN

Founding Partner, Social
Venture Technology Group

Sara Olsen is founder of SVT Group, founding board member of SVI United States, and co-founder of the Global Social Venture Competition. She is an adjunct faculty member at Middlebury Institute of International Studies and Hult International Business School.



ALEX OPPEs

Associate Director, Social Ventures Australia

Alex joined SVA's Impact Investing team in 2013 and is responsible for investing SVA's \$9m Social Impact Fund and the \$30m HESTA/SVA Social Impact Investment Trust. His responsibilities include deal origination, assessment and execution, portfolio management from investment through to exit and investor relations.



DAN OSUSKY

Standards Development Manager, B Lab

Dan oversees the B Impact Assessment, the exclusive tool used to certify B Corporations and issue GIIRS Ratings. The B Impact Assessment is currently used by over 40,000 businesses to measure and manage their impact on stakeholders including workers, community, customers, and the environment.



ANTON SIMANOWITZ

Director, Social Performance Solutions

Anton Simanowitz has spent the past 20 years working internationally to improve the effectiveness of social enterprises in delivering positive social outcomes. Anton is author of *The Business of Doing Good* – a book which outlines 6 insights for building effective social businesses that deliver on their good intentions.



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unpackingimpact.com

Mowat Centre

ONTARIO'S VOICE ON PUBLIC POLICY

The Mowat Centre is an independent public policy think tank located at the School of Public Policy & Governance at the University of Toronto. The Mowat Centre is Ontario's non-partisan, evidence-based voice on public policy. It undertakes collaborative applied policy research, proposes innovative research-driven recommendations, and engages in public dialogue on Canada's most important national issues.

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MowatNFP

MOWAT'S NOT-FOR-PROFIT POLICY RESEARCH HUB

As a part of Mowat Centre, the Mowat NFP research hub undertakes collaborative applied policy research on the not-for-profit sector. As part of an independent think tank, Mowat NFP maintains strong partnerships with government and with the sector and has a strong track record bringing diverse stakeholders together to engage in productive dialogue on complex public policy issues facing the sector today.



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Thank you for attending